

# Doni

## An Epilogue

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A project with both a remote and an on-site team, working to design possible improvements to the user experience of a mobile fintech application targeted to Generation X.

### The Goal

To apply the UX research and testing methodologies to an existing mobile application to derive and offer evidence-based design features that will increase the stickiness of the application.

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### Project Details

**My Role:** Designer & Project Lead

**Duration:** 3 weeks

**Tools:** Doni App, GoogleForms, Sketch, InVision

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#### Week 1



Survey, Usability Testing,  
Competitive Analysis

#### Week 2



Research Synthesis,  
Wireframing, 1st Prototype

#### Week 3



2nd Prototype, Testing,  
3rd Prototype, Presentation

# Client Research

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## Client Interview

The first step of the process was to get an idea for our client's current position, their goals, how we could fit into their product, and what we could accomplish for them. We attended to this in our first call with the client both in the US and Romania. We asked questions such as:

- Who is this application designed for? For use in what context?
- Do you have any data from previous user testing?
- Have you done any market research that we could see?
- What are your main flows?
- Do you have a demo account we could use for testing?
- Are there any areas that you would like us to avoid?

Answers to these questions gave us a clearer idea of our client and what they were looking for. We were able to acquire a competitive analysis that the client had already created, giving us an idea of where they stood in the marketplace. We ascertained that the client wanted us to do considerable user research, and then offer any possible improvements that we might have to the existing application.

## Heuristic Evaluation

Before we jumped into usability testing of the Doni app, we familiarized ourselves with the program by performing a heuristic evaluation as we tried it out for the first time. In order to keep our biases clear of the evaluation, we used Jakob Nielsen's Usability Heuristics, as listed below:

- 1) Visibility of System Status
- 2) Match Between System & Real World
- 3) User Control & Freedom
- 4) Consistency & Standards
- 5) Error Prevention
- 6) Recognition Rather Than Recall
- 7) Flexibility & Efficiency of Use
- 8) Aesthetic & Minimalist Design
- 9) Help Users Recognize, Diagnose,  
& Recover From Errors
- 10) Help & Documentation



*Jakob Nielsen*

# Heuristic Evaluation Examples

Issue	Heuristic Violated	Severity (1-4)	Notes / Recommendation	Image
What does the heart icon mean on My Goals?	#1 Visibility	2	It's unclear what the heart icon means on any specific goal. Recommend defining the icon somewhere in the app, or changing it to something more intuitively clear.	
"Hey" pop-up when creating a custom occasion while creating a new event.	#8 Aesthetic	2	"Hey" with no punctuation seems clumsy and misplaced for the task. Could be misconstrued as aggressive. Suggest dropping "Hey" all together - verbage on Android is more appropriate.	
As event coordinator, user cannot ask for a wishlist unless money has been contributed to the event.	#3 User Control	4	Request Wishlist button is unclickable unless event has received contributions - how can the user set up a gift & monetary goal if they aren't able to access the guest-of-honor's list of desired items? Suggest allowing user to request wishlist at any time.	

# User Research

## Survey

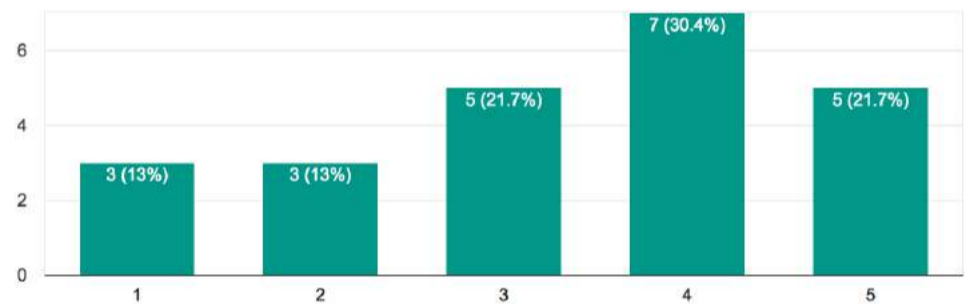
To get a better idea for how Generation Z functions as a whole, we created a survey using Google Forms, and distributed it to our personal networks to garner responses from age-appropriate people. We asked questions such as:

- How do you save money for an expensive item you're interested in?
- Who would you ask for contributions to a goal item?
- How much control do you want to have over the gifts you receive?
- Do you and/or your friends plan special occasions from one another?

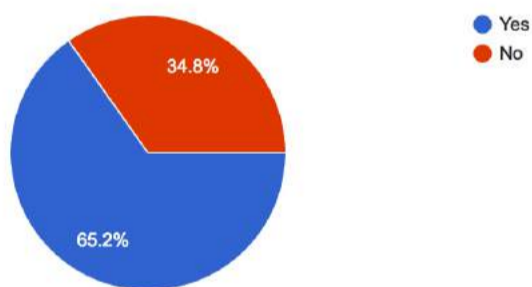
Having received 23 responses, we learned:

How much control do you want to have over the gifts you receive?  
23 responses

- Most respondents wanted control over their gifts.



Do you and/or your friends plan special occasions for one another?  
23 responses



- Most Gen Z members do plan events for one another

We also discovered:

- 87% would ask their family for contributions
- 65% would ask their friends for contributions
- Of those who plan events for one another, many use some sort of text or online communication to plan

Overall, the data from the survey validated Doni's strategy, showing that Gen Z has an interest in controlling their gifts, they will almost certainly source their close network for contributions, and they also use a platform similar to Doni's to coordinate events for each other. Given this research, Doni should be able to capitalize on Gen Z's goals, as long as they can keep users engaged.

# Usability Testing

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We tested the existing application with 4 users from Generation Z.



*Fernanda*



*InHang*



*Luckas*



*Reyner*

First, we asked general questions about the participants' backgrounds. This helped us to contextualize them as well as put them at ease before the test. Additionally, with a few questions we were able to prime the participants for the experience they were about to have. Example questions were:

- Do you do anything outside of your studies?
- What activities do you use your smartphone for?
- If you could get any product right now, what would it be?

Before we launched into the usability testing, participants were assured that we were testing the application, and not them. They were reminded that there were no wrong answers, and that we were most interested in their feedback about the experience, positive or negative. We reminded them to keep talking through the tasks, and to let us know what they were thinking or feeling at each step of the way.

We then asked participants to perform several tasks:

- Sign Up
- Create an Event
- Create a Goal
- Create a Wishlist

As they performed each of these tasks, we collected both qualitative and some quantitative feedback regarding their experiences. Quantitative questions were on a scale of 1-7, and included:

- How relevant was this task for what you normally do?
- How easy or difficult was it for you to perform this task?
- How satisfied are you with the app after performing this task?

After they completed the tasks, we asked them a few questions about their overall experience with the app:

- Overall, how satisfied are you with the application? (Scale 1-7)
- What are one or two things you like about the app?
- What are one or two things you disliked about the app?
- Is there anything missing that you would like to see?



## Key Findings

Overall, participants liked the app, and found it to be potentially useful. While most had difficulty with the flow the first time, as they performed a few tasks they found it became easier.

“Hard the first time, easy the second time.” ~ Reyner

### Good

- Liked signing in with Facebook
- Liked the color scheme
- Liked the idea of fundraising with their network
- Liked being able to see who donated the money

### Bad

- Unclear wording - ie. “Recipient”
- Desire for a Home Screen
- Savings slider was unclear
- Desire for goals with longer limit than 3 months
- Desire for photo feature

## Research Synthesis

Given all the data we gathered from the survey and usability testing, we began to extract meaning from the chaos by placing our findings into an affinity map.



After organizing our data into this map, we found several features that users were interested in:

- Home Screen
- Tutorial
- In-App Notifications
- Video Recording/Sharing
- Direct Messaging
- Sharing of contributions on social media
- Clear Verbiage
- Plan Further in Advance than 3 Months
- Automatic Contributions
- “Friends” feature for the app
- Special Characters in Text-Entry Fields

## Feature Quadrant

To get an idea for the feasibility of the desired features, we got in touch with a developer, and asked him to rate the difficulty of each feature on a scale of 1-5. Based on research, our team determined which features were most crucial to the app, and which would just be nice to have. We then plotted each point on a graph using this information from both sources, and determined what features we should focus our effort on. Luckily, most of our proposed features were relatively easy to accomplish.



## Problem & Solution Statements

As our design target coalesced, we developed problem and solution statements to conceptualize who we were designing for. We used a Gen Z persona provided to us by Doni.

### Problem Statement

*As a young adult who wants to save for expensive products instead of making many inexpensive purchases, I need a way to combine my network's resources so that their generosity is put to the best use.*

### Solution Statement

*Restructure the existing app to allow for Gen Z users to clearly express and brand themselves as they raise funds to achieve their goals, all the while developing their existing networking skills.*

# Sketching & Wireframing

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## Design Principles

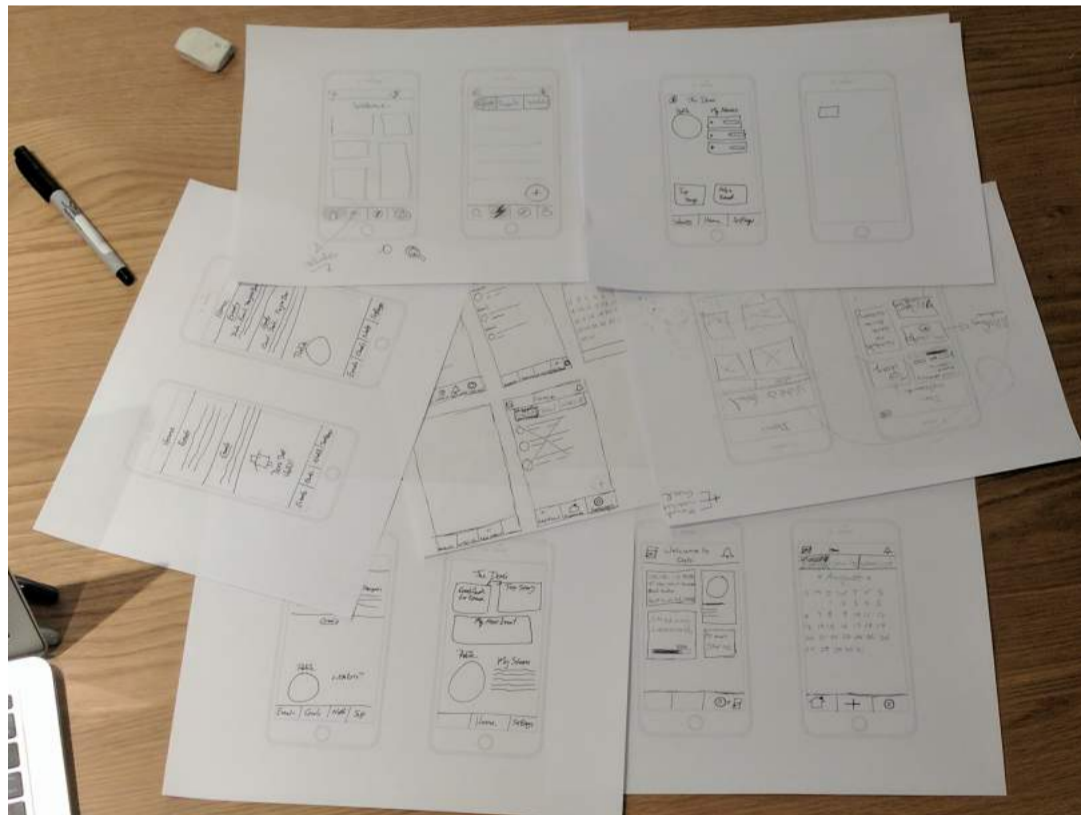
As a means to keep our design process on course, we devised a handful of principles to keep in mind as we sketched and wireframed:

- 1) Keep the user connected with friends
- 2) Engage user with multiple functions
- 3) Allow user to express identity through functions of the app
- 4) Keep it clear and simple
- 5) Help users reach their goals faster

## Design Studio

With those principles to guide us, we did a team design studio, in which we chose a feature and:

- Individually sketched ideas - 8 Minutes
- Presented & critiqued ideas - 15 Minutes
- Sketched & refined a complete solution - 8 Minutes
- Presented & critiqued solutions - 15 Minutes
- Converged on a single solution - 10 Minutes



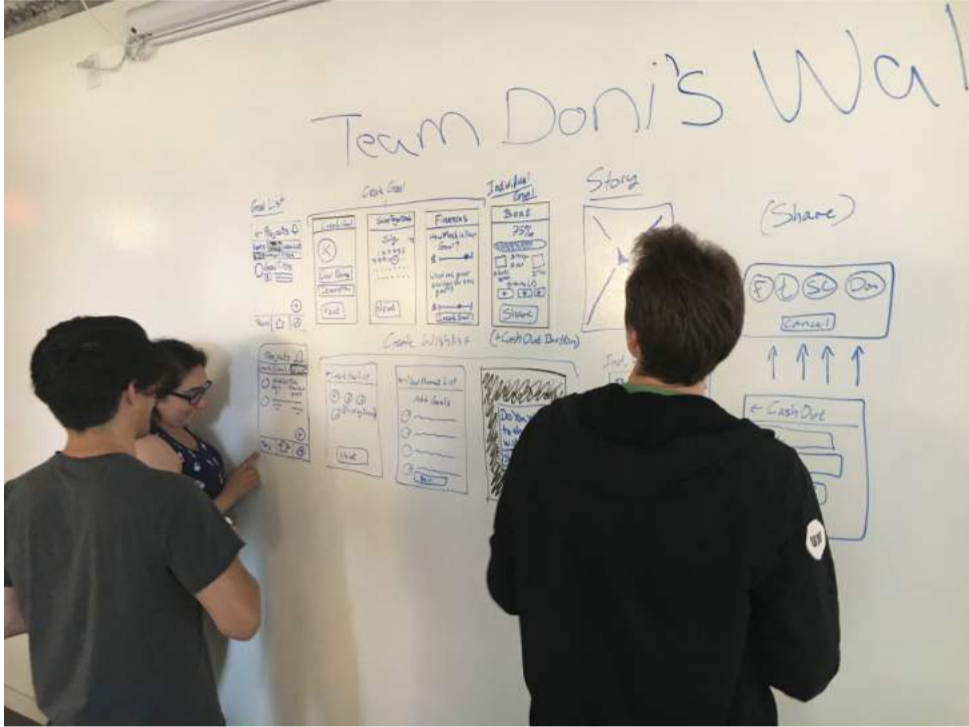
*Design Studio of the Home Page*

This strategy was very effective, as it allowed each team member to work independently to come up with a clear idea, and then take advantage of others' input at intervals to build out those ideas and make them better and more complete. We were able to get the best of both worlds in terms of individual inspiration and team collaboration, and using a timer ensured we made the best use of our time.



## Whiteboard Sketching

We also took advantage of the whiteboards at our disposal to work through some of the less-complicated sketches and keep an eye on the high-level user flows we were designing.



Sketching Out Goal & Wish List Flows



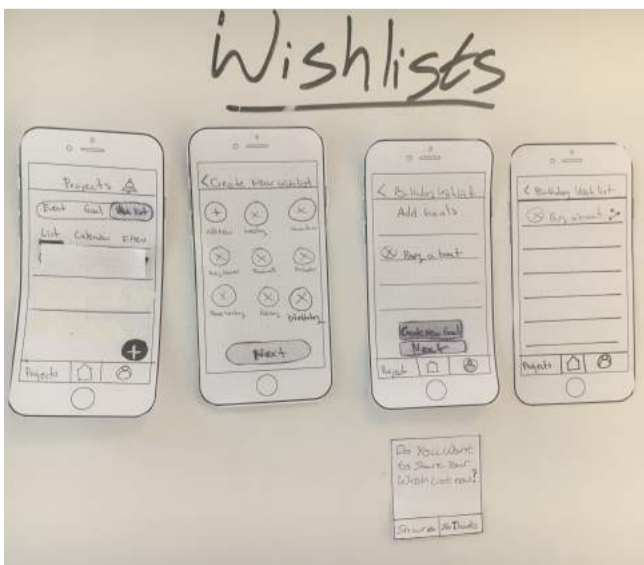
Determining how to incorporate a video function into Goal Flow

## Wireframing

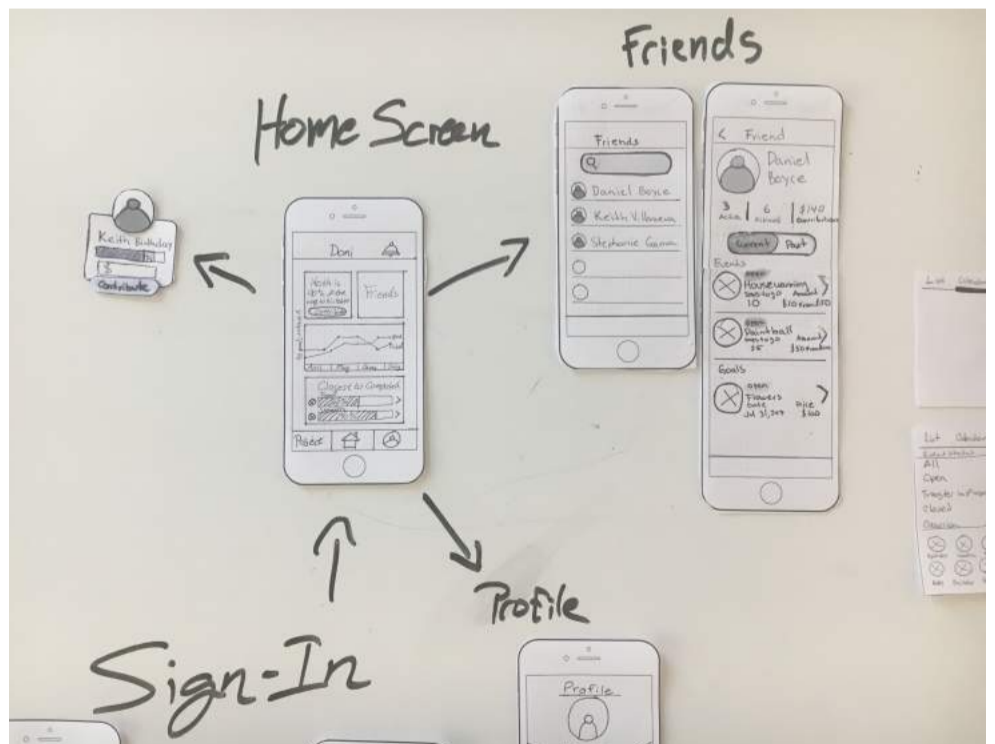
We took our best sketching ideas and transferred them onto paper iPhone templates in gray scale, to be used in our first paper prototype to test our ideas.



Goal Creation



Wish List Creation



Home Screen & Related Functions

# Paper Prototype & Usability Testing Iteration N°1

Combining all our wireframes, we created our first paper prototype and began testing.



## Usability Testing

We tested three participants with our paper prototype, using the same method as the first testing round:



*Fernanda*



*Liz*



*Danielle*

We found in this testing round that the price slider for determining a goal amount was not just unclear, but also undesirable.

“Doesn’t make sense to have a (price) slider, because it implies a max, for an app that has so many different goal possibilities.”

- Danielle





We also found that users would not be deterred from using the app because of the 3.5% transfer charge, but they felt like they should have been informed of it earlier in the app.

“Woah, I thought you were trying to help me out - now I see what you’re doing.”

~ Liz

## Key Findings

- Users wanted an option to send a personalized message when sharing their events or goals.
- Use of “Title” in lieu of “Recipient” in Events was more clear.
- Confusion on the nature of an event - who the event is for.
- Confusing to have “Ask for Wishlist” option on event, even if the event is for the user.
- Desire for preview/edit option on the video function
- Desire for option to take pictures or write descriptions, in addition to the video
- Regarding the repeat contribution, users wanted a calendar so they could see exactly when the contribution was scheduled to come out.

## Digital Prototype & Usability Testing Iteration N°2

Taking user feedback into account, we shifted our wireframes into digital format in gray scale, and configured them into flows in a prototype on InVision. We then tested this prototype on an iPhone with 2 users, using the same testing method as previous tests:



*Fernanda*



*Lucas*

“Easy to use and useful - I like that I could share to Facebook so you can show more than just Doni people. Apps can be limited.”

~ Fernanda



The tutorial pop-up that we incorporated for onboarding users was easily skippable, but present to inform those who would learn that way.

“I’m the kind of person who would go around and see how things work to figure it out - I’m not the person who would read the instructions.”  
~ Luckas



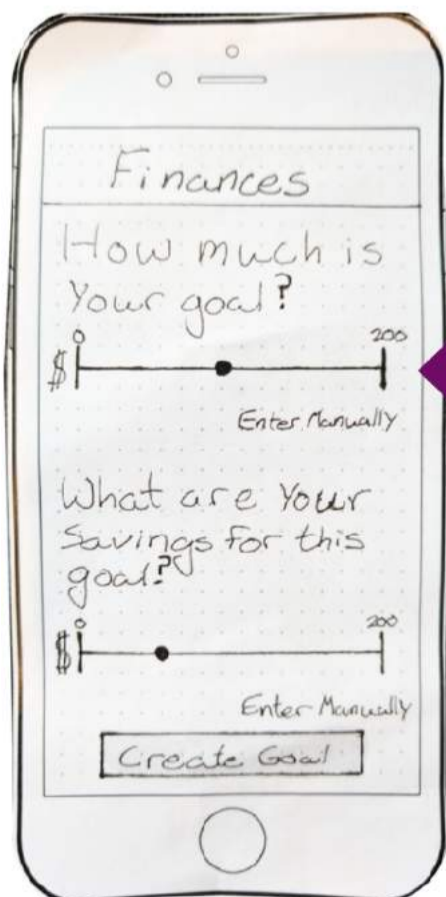
## Key Findings

- Remove “Past” from Friend’s project page
- In Wish List function, change “Add Goal” to “Add to List”  
Differentiate this action from “Create Goal”
- In contribution page, add (?) icon next to “recurring” to define the term

Having gathered another round of feedback, we were able to apply the necessary changes as we transitioned into our third, high-fidelity prototype. Due to time constraints, we were unable to test this prototype with users.

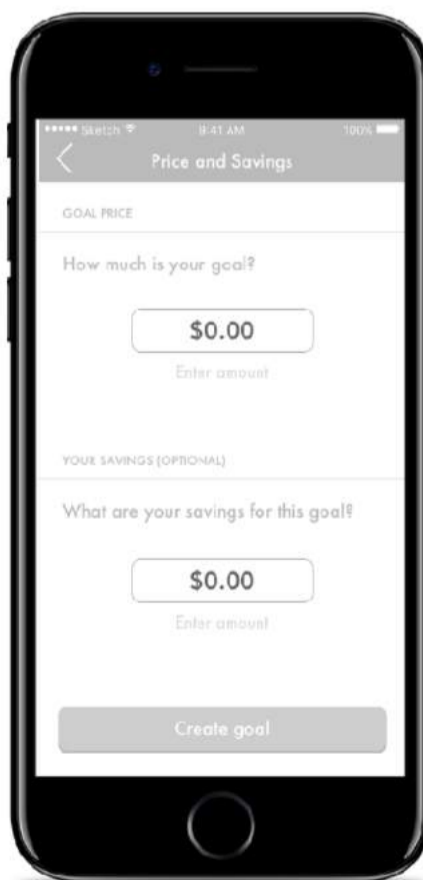
## Evolution of Screens: Iteration N°1 - Iteration N°3

### Price & Savings Screen



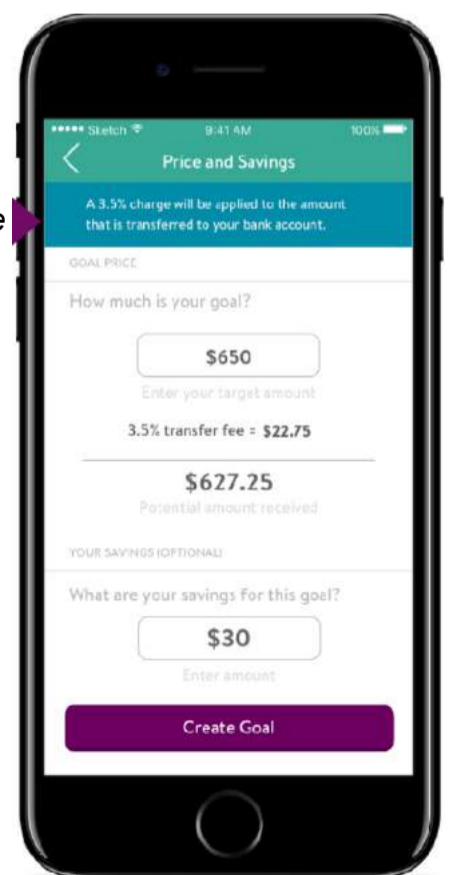
Iteration 1

All users preferred to enter the monetary values manually, rather than use the slider



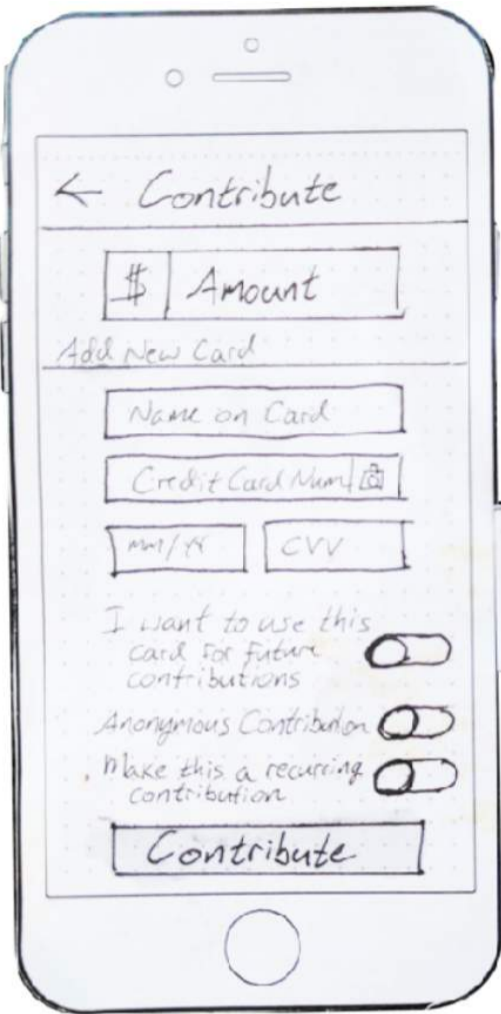
Iteration 2

Users wanted to be informed of the 3.5% surcharge earlier, so we placed it on this page, and added a calculator.



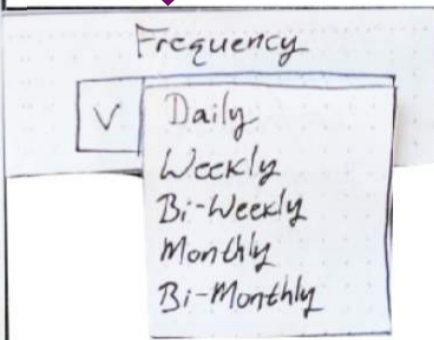
Iteration 3

# Contribution Screen



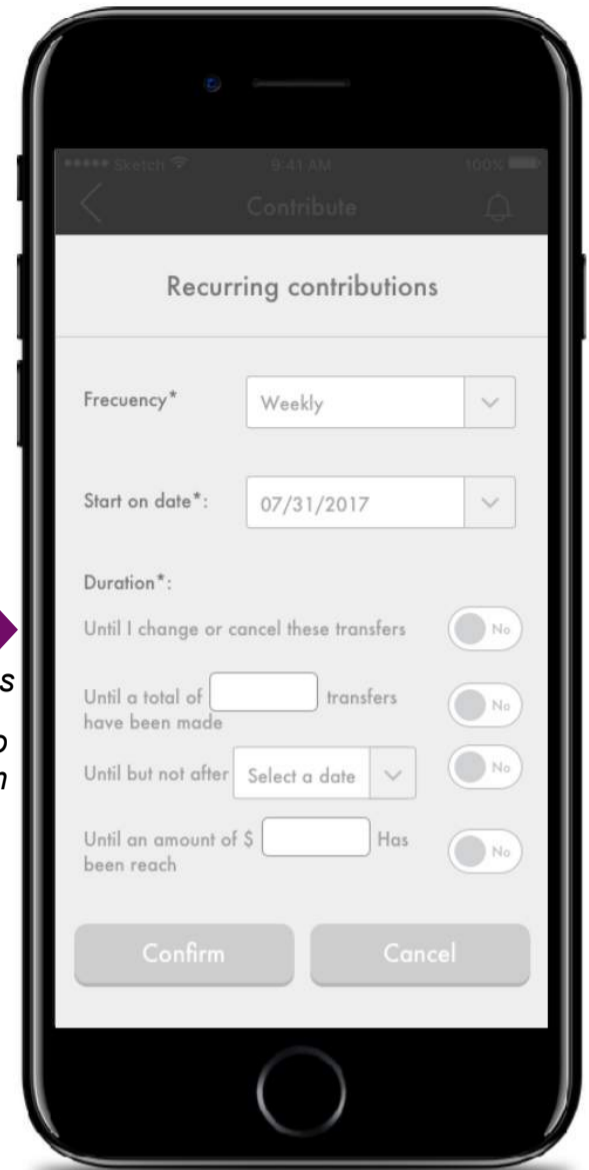
Iteration 1

Users liked the recurring contribution feature, wanted a calendar, so she would know exactly what day the payment would be made.

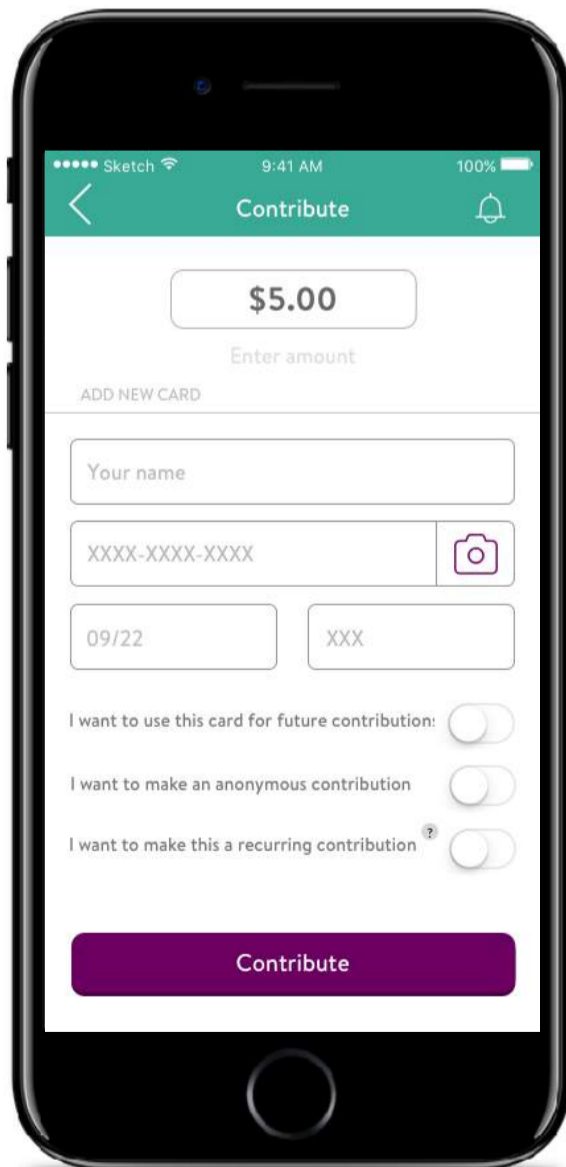


Users liked the option to set limitations to recurring payments

"I can stop myself from paying too much money - I just want to reach a certain amount." ~ Lucas



Iteration 2

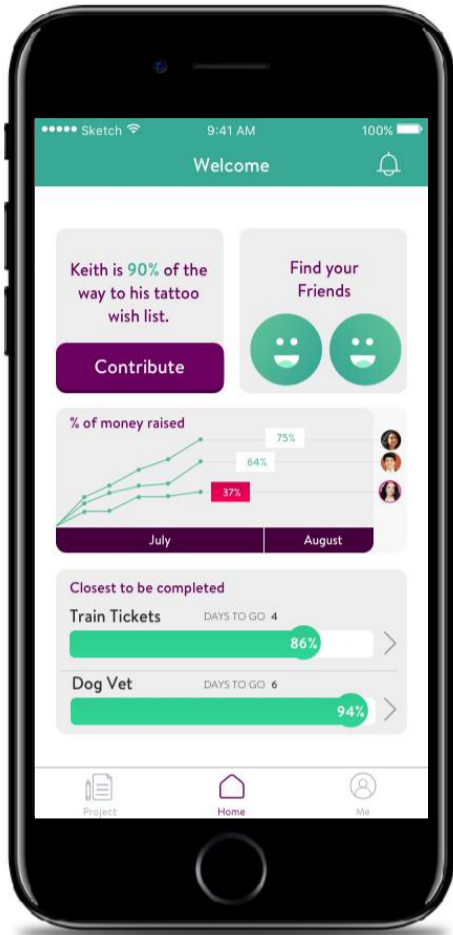


Iteration 3

Not all users were familiar with the term "recurring," and so we added an information icon next to the word to define it if necessary

# Main Features Added

## Home Screen

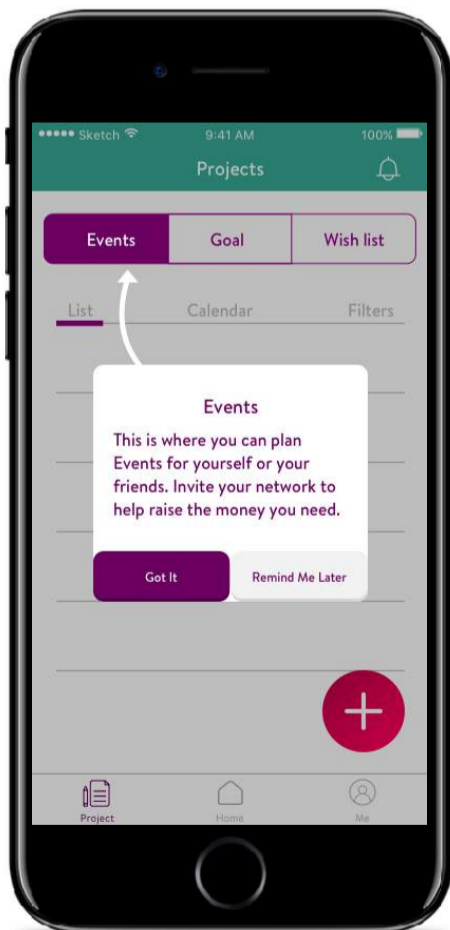


Users expressed a desire for a home screen to help orient them within the app.

From this screen, users can:

- Make a quick contribution to a friend's goal
- See a list of their friends in the app
- Observe how much money they have raised, compared to others
  - This gamifies the app, introducing a competitive aspect
- See a quick summary of users own goals.

## Pop-Up Coaching Screens

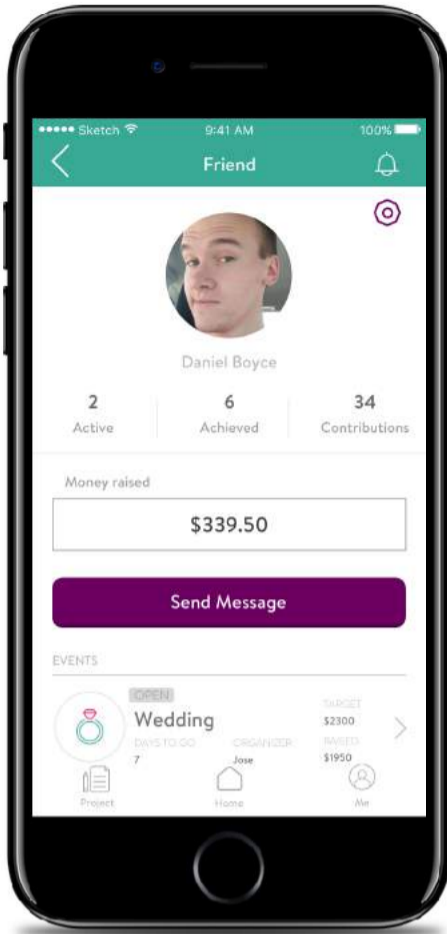


A learning curve to understand the app's function was one of the biggest roadblocks and frustrations for first-time users. However, each user understood the app's functions by the end of the usability testing.

Since the learning curve was not too steep, we opted to design an easily escapable tutorial function in the form of pop-up screens.

The feature was validated by user testing, as those who needed it found it clarifying, and those who did not were able to quickly exit and learn by doing.

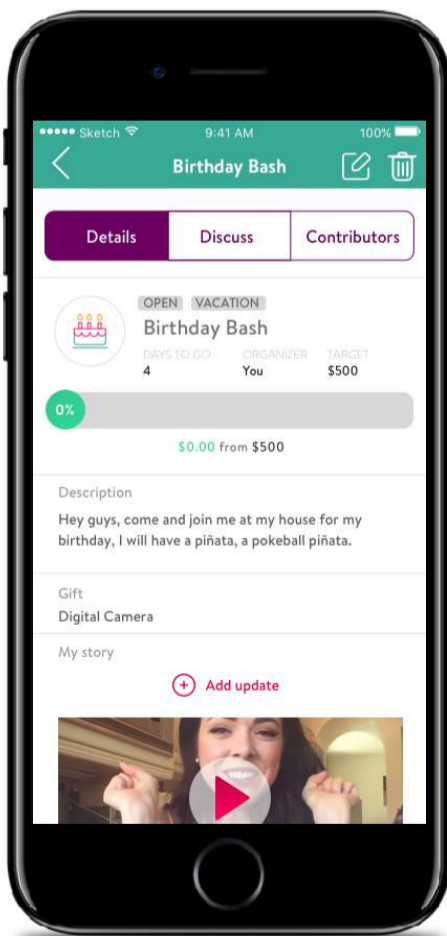
## Friends/Profile Feature



As a means to keep users connected with their friends on Doni, and as a natural progression from the self-branding profile page, we designed a Friends feature within the app.

Per user request, we removed an option to see friends' past events and goals, because they did not think it was relevant information.

## Video/Photo Capture



To keep the user engaged and allow them to truly brand their events and goals, we designed a video/photo feature that could be shared with their networks.

We called it “My Story,” drawing from the lexicon of other social media. This choice was validated by our users, as they understood its meaning immediately.

Through user testing, we found that a (+) icon was not clear enough to indicate an option to make another video, so we clarified this with the addition of “Add Update,” a choice which was validated by our users.

# Conclusion & Next Steps

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Doni is an application that seeks to help people, particularly Generation Z, source and gather contributions from their networks, so that they can achieve their financial goals more quickly. It also serves to teach members of Gen Z best financial practices. They accomplish this by offering features to advertise goals, events, and wishlists to the user's network. The product is fully functional, but they were interested in getting input from UX designers, to ensure their product would be successful with their target audience.

Given a reasonably broad task, our team began interviewing members of Gen Z to learn how they saved, how they spent, and how they felt about the app in its current form. Through user research we found that there were some clarity issues in the app, regarding wording and feature function. We also discovered the users' desire for a more engaging experience, through which they could express themselves and their goals more faithfully.

To make the app more clear, we changed the wording of a few components and added a short and skippable pop-up coach window to explain the main features. To make the experience more engaging, we introduced a video/photo feature to events and goals, which could be shared on multiple social media outlets. We also introduced an in-app friends function which would allow users to see friends' activities and communicate directly through Doni. The features were all validated by users, with some minor adjustments to each that we made throughout the iteration process. By our last prototype, users were almost certain to return to the app, and to recommend it to others. Once they understood the utility of the app, they found it fit seamlessly into their goals and behavior.

## Moving Forward

### Improving My Design Process

**Use Same Quantitative Format for Each Test** - While we used a near-identical format for each of our usability tests, we did not ask the same quantitative response questions each time. Doing this would allow us to draw a clearer line of progress from one iteration to the next.

**Create Distinct Tests** - Instead of adding to the same test and making it larger. As we designed features to meet user needs, we still kept the original flow from our first usability test which was primarily concerned with onboarding. Building other features on top of these existing tasks made each test longer and more unwieldy than the last.

**Clearly Define & Demonstrate Tasks for the Team** - As project lead, I was responsible for keeping my team on track throughout the research and design process. In the beginning I knew I had to define tasks and timelines to keep the pace, but it wasn't until the end that I found it was most effective to define a task, *demonstrate it*, and then ask that the task be repeated until the larger goal was achieved. This method was particularly useful with a team that lacked prior UX experience.

### Improving the Application

**Continue Usability Testing** - While progress was made with the onboarding process and clarity, the social engagement features of the app could be tested more to refine their functionality and ease of use.

**Change Order of the Home Screen** - It would be worthwhile to do A/B testing with the order of items on the home screen, to determine the best placement for each function.

**Introduce Out-of-App Contributions** - As the app currently exists, contributors need to have signed up with Doni to make a contribution. Removing this step from the contribution process would make it easier and more appealing for people to contribute to a user's goal/event.